



# GETTING TO OUTCOMES

A User's Guide  
to a Revised Indicators Framework  
for Education Organizing

January, 2013



Prepared by Research for Action  
for Communities for Public Education Reform, a project of Public Interest Projects



**Research for Action (RFA)** is a Philadelphia-based nonprofit organization. RFA seeks to use research as the basis for the improvement of educational opportunities and outcomes for traditionally underserved students. RFA's research is designed to: strengthen public schools and postsecondary institutions; provide research-based recommendations to policy makers, practitioners, and the public at the local, state, and national levels; and enrich the civic and community dialogue about public education.



**Communities for Public Education Reform (CPER)** is a collaborative of national and local foundations committed to ensuring that low-income youth of color secure their right to a quality public education. CPER is grounded in the belief that community engagement is a critical lever in successful school reform. The Fund is a project of Public Interest Projects (PIP), a 501(c) (3) New York-based public charity.

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## ACKNOWLEDGMENTS





# PREFACE

**COMMUNITIES FOR PUBLIC EDUCATION REFORM (CPER)** is a national funding collaborative that supports a specific change approach — community organizing — to bring about education reform that expands equitable opportunities and outcomes for low-income youth, particularly in communities of color. A project of Public Interest Projects, CPER has raised 30 million dollars from 79 national and local donors since its founding in 2007, providing multi-year core support, capacity building, peer learning, and technical assistance services to some 125 organizations across the country.

CPER draws on the collective power of highly diverse stakeholders — first and foremost, grassroots organizing groups — who ally with national and local funders, advocacy and policy experts, leading scholars, and others to ensure all students an equal opportunity to learn and thrive. As parents, youth, and allied community members collaboratively campaign for equity-focused education reform, they develop individual and community leadership and power — capacities critical to building a civic infrastructure and a genuinely participatory democracy. This work is difficult and slow-going; it requires smarts, skills, and stamina. In this challenging context, how can we know that we are making a difference? What combination of strategies and competencies enable the results we seek? And how do we best capture outcomes in the multiple realms touched upon by community organizing campaigns — change in individuals, communities, and education policy and practice?

CPER's diverse funders ask these important questions in order to make sure that

their investments are sound. Grassroots organizing groups also ask these questions in order to assess campaign strategies, wins, and losses, and to determine whether and how to retool efforts along the way. In CPER's first phase of work (2007–2009), we sought answers through an external evaluation of CPER-supported organizing. Over the past three years (2010–2012), community groups have scaled their efforts, formed new alliances, adopted new strategies, and crafted new responses to a constantly shifting education reform landscape. These conditions prompt us to dig deeper in order to better understand our operating theory for how organizing contributes to the change we seek, and to identify a more robust array of indicators, measures, and data sources for ascertaining our varied outcomes.

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## **How do we best capture outcomes in the multiple realms touched upon by community organizing campaigns — change in individuals, communities, and education policy and practice?**

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CPER's partnership with Research for Action (RFA) builds on RFA's important work in this domain, as well as on the knowledge of community groups and funders across the country who are jointly committed to securing educational rights for all youth. We hope this Revised Indicators Framework for Education Organizing can strengthen field knowledge and thereby contribute to enabling more effective and powerful work going forward.

Melinda Fine, Ed.D., Director  
Communities for Public Education Reform  
Public Interest Projects

# GETTING TO OUTCOMES

## A User's Guide to a Revised Indicators Framework for Education Organizing

### INTRODUCTION

Education organizing groups have grown in number, size, and sophistication over the last decade in the midst of a dramatically changing educational landscape. In the face of increased federal and state involvement, a rise in private-sector contracting, new challenges to teacher unions, and a narrowing of the definition of school success, organizing groups have maintained focus on making public education more equitable and responsive to increasingly diverse student populations. They have worked to ensure inclusion of parent, youth, teacher, and community member voices in school decision making while strengthening low-income communities and developing youth and adult leaders.

Research about education organizing has also proliferated during the past decade, generating an increasingly rich collection of case studies, national surveys, and other analyses. Research for Action (RFA) has been among those engaged in this work

and has drawn on its previous efforts — as well as the knowledge built by community organizing groups and other researchers — to create this User's Guide. The Indicators Framework offered here can serve as a tool to help education organizing groups engage in self-reflection and evaluation of their efforts. At the same time, organizing groups, funders, and educators can use this framework to make a stronger case for an education reform paradigm that starts with and builds the resources and strength of the stakeholders most directly affected by what happens to public education.

In 2002, in partnership with the Cross City Campaign for Urban School Reform, RFA developed a theory of change explaining how education organizing worked to strengthen communities and improve schools. Accompanying this theory of change was a set of indicators that could be used to assess the outcomes of the organizing process. Recognizing the value

of such tools, and in light of the substantial changes within education organizing groups and in the education field, Communities for Public Education Reform (CPER) commissioned RFA to update its previous work.<sup>1</sup>



This updated Indicators Framework reflects the adaptations education organizing groups are making in response to the new education realities, and to over a decade of experience working to change schools in low-income neighborhoods. Together, the theory of change and indicator charts that make up the Framework provide a common understanding of education

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1. At the time, the Cross City Campaign for Urban School Reform was a national organization based in Chicago and led by Anne Hallett. The Cross City Campaign sought out a partner to work on developing indicators for measuring the impacts of education organizing and chose RFA, which worked closely with both Anne and Chris Brown throughout the project. The original User's Guide ([http://www.researchforaction.org/wp-content/uploads/publication-photos/103/Gold\\_E\\_CCC\\_Strong\\_Neighborhoods\\_Strong\\_Schools.pdf](http://www.researchforaction.org/wp-content/uploads/publication-photos/103/Gold_E_CCC_Strong_Neighborhoods_Strong_Schools.pdf)) was a product of that project. The current User's Guide is heavily indebted to that past work.

organizing, and a common language for discussing its processes and outcomes in the current reform era.

The **THEORY OF CHANGE** offers an overview of how the strategies of education organizing can lead to various outcomes — not only in the form of education “wins,” but also the capacity building and empowerment that emerge from the organizing process. The **INDICATORS**, organized into a set of charts, include quantitative and qualitative measures of these processes and outcomes. In order to make the theory of change and complementary indicator charts accessible, this guide provides a detailed explanation of how to use them to measure and demonstrate the impact of education organizing on education systems, individuals, and communities.

## METHODS

In order to update the theory of change and indicators, RFA reviewed the substantial literature that has been generated in the decade since our original work (see Appendix A for a bibliography of recent literature). Through a review of multiple case studies of education organizing groups and their campaigns, we identified common tactics, strategies, and outcomes.

RFA also conducted interviews with staff and leaders of six CPER-supported groups in three locations across the country. Organizations were selected in collaboration with CPER staff (see Appendix B for group identification). These CPER-supported groups include both youth and adult organizing, are geographically and racially diverse, and represent different organizing traditions. The knowledge we gleaned from the literature, and from the organizing stories relayed by interviewees, helped us to revise our original theory of change and to identify indicators grounded in the realities of today's education organizing groups.





We obtained feedback on the revised tools from CPER staff, organizing groups, and funders. We also shared our work at the 2012 Annual CPER convening with a fresh set of organizing groups and funders whose responses further shaped the content and form of the final product.

## ORGANIZATION

This User's Guide is designed to scaffold the use of the theory of change and indicator charts. The next section (page 8) presents the theory of change graphically and describes how to interpret it. The section that follows (page 18) explains how to read the indicator charts. Finally, beginning on page 21, we present the indicator charts in full.

## AUDIENCES

We have developed this framework to be useful to multiple stakeholders, including education organizing groups, funders, and educators.

### **YOUTH AND ADULT ORGANIZING GROUPS**

can use the theory of change and indicator charts to reflect on their efforts and make adjustments to improve outcomes. Groups can also use these tools to develop evaluations that can undergird their arguments for support from funders and educators. Evaluation can take the form of self-study, or groups can work with a third-party evaluator to shape an evaluation to reflect their particular process of education organizing.

**FUNDERS** can use the theory of change and indicator charts to ground their understanding of education organizing. The indicators can help them understand the relationships among the various activities of organizing groups and their respective outcomes. This can help funders to structure their giving, and ultimately demonstrate the value of their investments.

**EDUCATORS** can use the theory of change and indicators to understand how the efforts of youth and adult education organizing can complement their work and contribute to improving schools.

## HOW CAN THIS FRAMEWORK BE USEFUL TO YOU?

**EDUCATION ORGANIZING GROUPS** are interested in understanding how to strengthen their organizations and processes so that their efforts are more effective in leading to educational and transformational change. They are also interested in communicating to funders, educators, and potential allies about their approach and their successes. They may have questions about:

- Their power as an organization to carry out their work and be successful;
- The degree to which they are able to take action to exert pressure, create public accountability, and have their agendas promoted by those in power;
- What educational wins their efforts are bringing about at different levels — school, city, state, or federal; and
- What they can point to as evidence that their efforts are having a transformative impact on students, schools, parents, and communities.

**FUNDERS** are interested in understanding both which groups are best bets for investment, and what activities they should be investing in to improve educational outcomes. They are also interested in tracing how educational institutions are changing and improving as a result of their investments in education organizing. They may have questions about:

- How they can help education organizing groups gain power to carry out their work and be successful;
- What kinds of actions are most important for education organizing groups to take in order to have their agendas promoted and to generate public accountability, i.e., a response to their demands;
- What wins have occurred — in resources, policies and practices, and governance — as a result of the efforts of education organizing groups they have invested in; and
- How their investments have led to long-term transformational changes on individuals (students, parents, and community members), communities, and schools.

**EDUCATORS** are interested in knowing what difference education organizing can make for students and schools. They might have questions about:

- What educational and school climate issues education organizing groups can best affect;
- What role education organizing groups play in creating a political environment supportive of public education;
- What role students, parents, and community leaders can play in school governance; and
- How education organizing can strengthen school/community collaboration.



# THEORY OF CHANGE

## for Education Organizing

There is much variation in the style and focus of education organizing groups. There can be differences between youth and adult organizing, for instance, in the way they carry out leadership development or in the issues they prioritize. In our analysis, however, we have identified many commonalities across cases. Thus, we have developed an overarching theory of change that we believe accurately describes the work of education organizing.

On page 9 we present our updated theory of change visualized as a transit map. We then examine the different components of the theory of change represented in the map, using stories from CPER-supported organizing groups to bring organizing strategies and outcomes to life.

## THE MAP

We selected a transit map as a metaphor for the theory of change because it highlights the multiple paths that education organizing groups take as they work towards change. As the map on page 9 illustrates, there are four major zones through which the work of education organizing passes, starting with the organizing processes of building power and taking action and continuing to interim and long-term outcomes in the form of education wins and transformational change. Yet, within each of these zones organizing groups have choices to make about how to

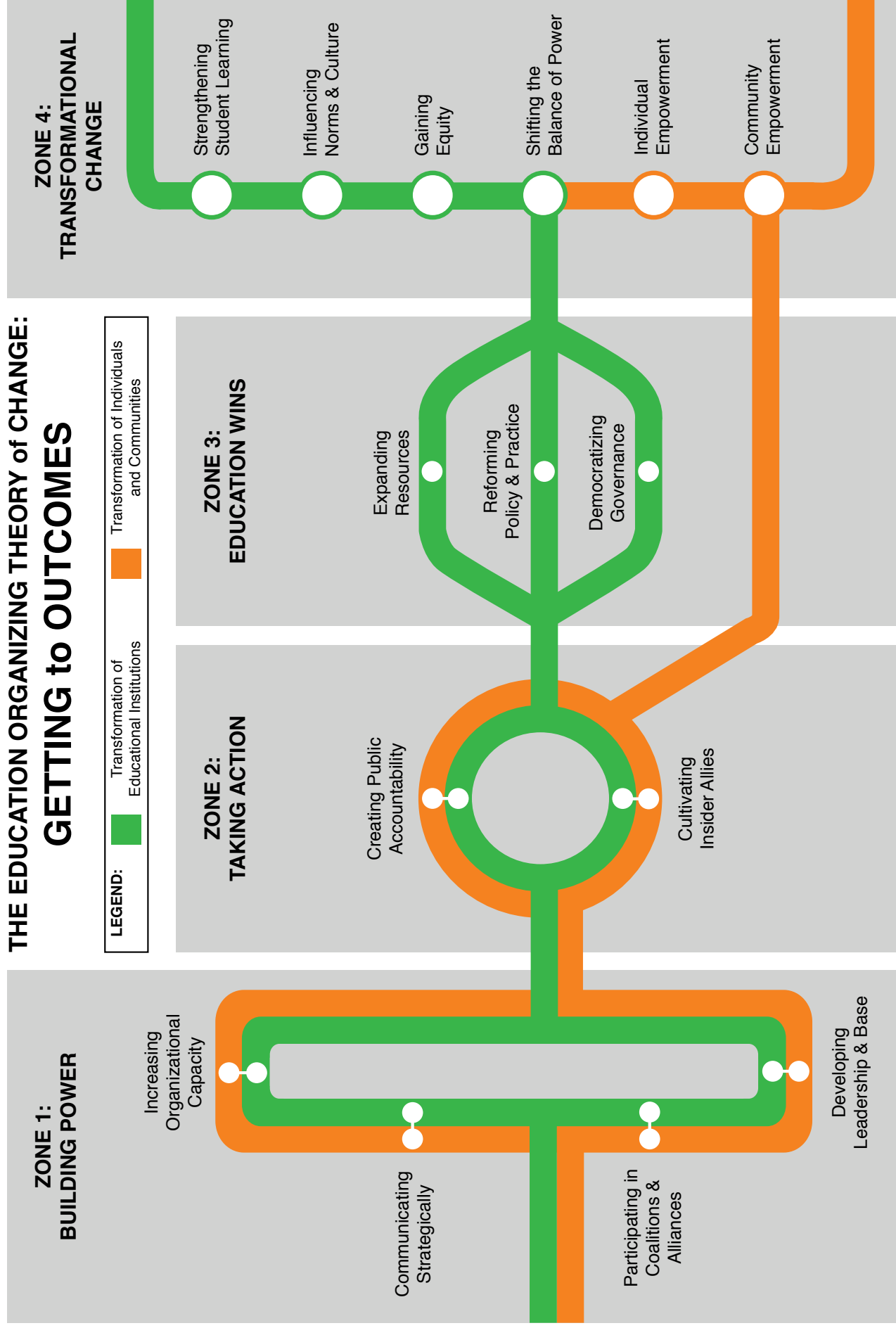
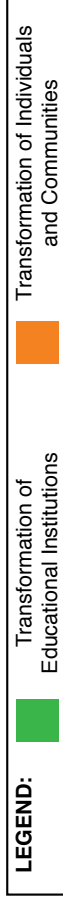
effectively build power, what kind of action to take, and what types of change they seek.

Our transit map has two lines, representing the two main routes through which organizing can lead to change. Organizing can lead to change via campaign wins and the transformation of educational institutions (represented by the green line). The process of organizing directly produces individual and community change (the orange line). These two change processes occur simultaneously, and are mutually reinforcing. However, by separating the two lines, the map highlights the fact that individual and community transformation can occur even when institutional change is slow in coming.

There are multiple “stops” along these routes to change. These stops represent organizing strategies that a group may pursue. Each strategy has an implicit goal, and progress toward that goal can be measured. The strategies that a group concentrates on are determined by factors such as its power, campaign focus, and resources.

The organizing process is an iterative one. In other words, it does not have an end. Once a campaign achieves wins, the process begins again, but at a new level reflective of prior outcomes. This iterative process, over time, is what leads to transformational change.

# THE EDUCATION ORGANIZING THEORY of CHANGE: GETTING to OUTCOMES



# ZONE 1:

## BUILDING POWER

As the map shows, the paths to institutional change (green line) and individual and community empowerment (orange line) begin in parallel as an organizing group goes through the process of building power. Building power is the core work of all organizing and also the basis upon which change efforts rest.

In the Building Power zone, we have identified four strategies that organizing groups generally use to build power: developing their leadership and base, increasing organizational capacity, participating in coalitions and alliances, and communicating strategically.

Organizing groups **DEVELOP THEIR LEADERSHIP AND BASE** by increasing the number of people involved with the organization and its campaigns, as well as supporting them in learning about community issues and gaining the necessary civic and organizing skills to design and carry

out campaigns. Groups also build power by working to **INCREASE ORGANIZATIONAL CAPACITY**. This means making sure staff, leadership and base, organizational structure, and funding sources are adequate and aligned with a collective vision for



### BUILDING POWER: COALITIONS AND ALLIANCES

**YOUTH UNITED FOR CHANGE (YUC)** in Philadelphia offers a good example of how a group can build on strengths developed over many years and then expand its influence by participating in local and national partnerships. As part of its ongoing efforts to reform school disciplinary practices and interrupt the “school-to-prison pipeline,” YUC formed a partnership with the Advancement Project, a national civil rights group, which provided YUC with the research and technical support needed to produce their well-regarded and widely disseminated 2011 publication, *Zero Tolerance in Philadelphia: Denying Educational Opportunities and Creating a Pathway to Prison*. YUC also worked closely with the Education Law Center, which represents disciplined students, and with CPER-supported groups in Philadelphia and across the country pursuing disciplinary reform. In addition, YUC joined other local youth organizations in the newly-formed Campaign for Nonviolent Schools. Finally, to address national policies and create a broad movement, YUC co-founded the Alliance for Educational Justice, a coalition of 20 youth and intergenerational organizing groups from across the country. Through this coalition, YUC and other groups are bringing attention to discipline and school climate issues, building relationships with national decision makers, gaining national support for local efforts, and providing leadership development opportunities for their leaders.



change, which is acknowledged by key decision-makers. In powerful organizations, staff can use data for reflection on and improvement of the group.

Building on the power of their leadership and base, community organizing groups work collaboratively with partner organizations in **COALITIONS AND ALLIANCES**. Such collaboration increases groups' power by expanding their numbers, expertise, and the range of stakeholders engaged in advancing their issues. (The vignette on page 10 provides an example of how a CPER-supported youth organizing group formed alliances and participated in national coalitions to increase its power by expanding its expertise and influence.)

Finally, to frame issues effectively and disseminate their messages, organizing groups **COMMUNICATE STRATEGICALLY** through multiple forms of media. This is critical to building their power because it is how they disseminate information and bring a community voice to the fore on educational issues. (The vignette below shows how a CPER-supported adult organizing group focused on its communications strategy to increase its ability to grow and strengthen its base of members.)



Building power is a continuous process. The Building Power loop highlights the ongoing, iterative nature of the process. Groups may pursue these strategies simultaneously, or as needed. In other words, a group may decide not to spread its resources equally across them. Regardless, for education wins and transformational change to occur, a group needs to accrue enough power so that its actions can bring about substantial, and ultimately sustained, change.

## BUILDING POWER: COMMUNICATIONS

Philadelphia's **ACTION UNITED**'s effort to strengthen its use of social media offers an illustration of how a focus on communications can contribute to a group's overall work in building power. Action United staff believed that they could gain recognition for their education organizing efforts, gain new allies, and further expand their base by targeting audiences and communicating about education reform via the web. To carry out an enhanced communications strategy, Action United decided to strengthen its capacity by hiring a part-time Communications Director. The Communications Director guided them in designing and implementing a strategy that places an emphasis on social media, including Facebook, Twitter, and YouTube to promote events, highlight successful actions and meetings, spread education information, and provide a space for leaders and base to discuss important issues. In addition, Action United promotes text messaging during neighborhood meetings to disseminate information about upcoming events and actions to members' acquaintances and contacts. Currently, Action United texts messages to between 2,000 and 2,500 people about its events.

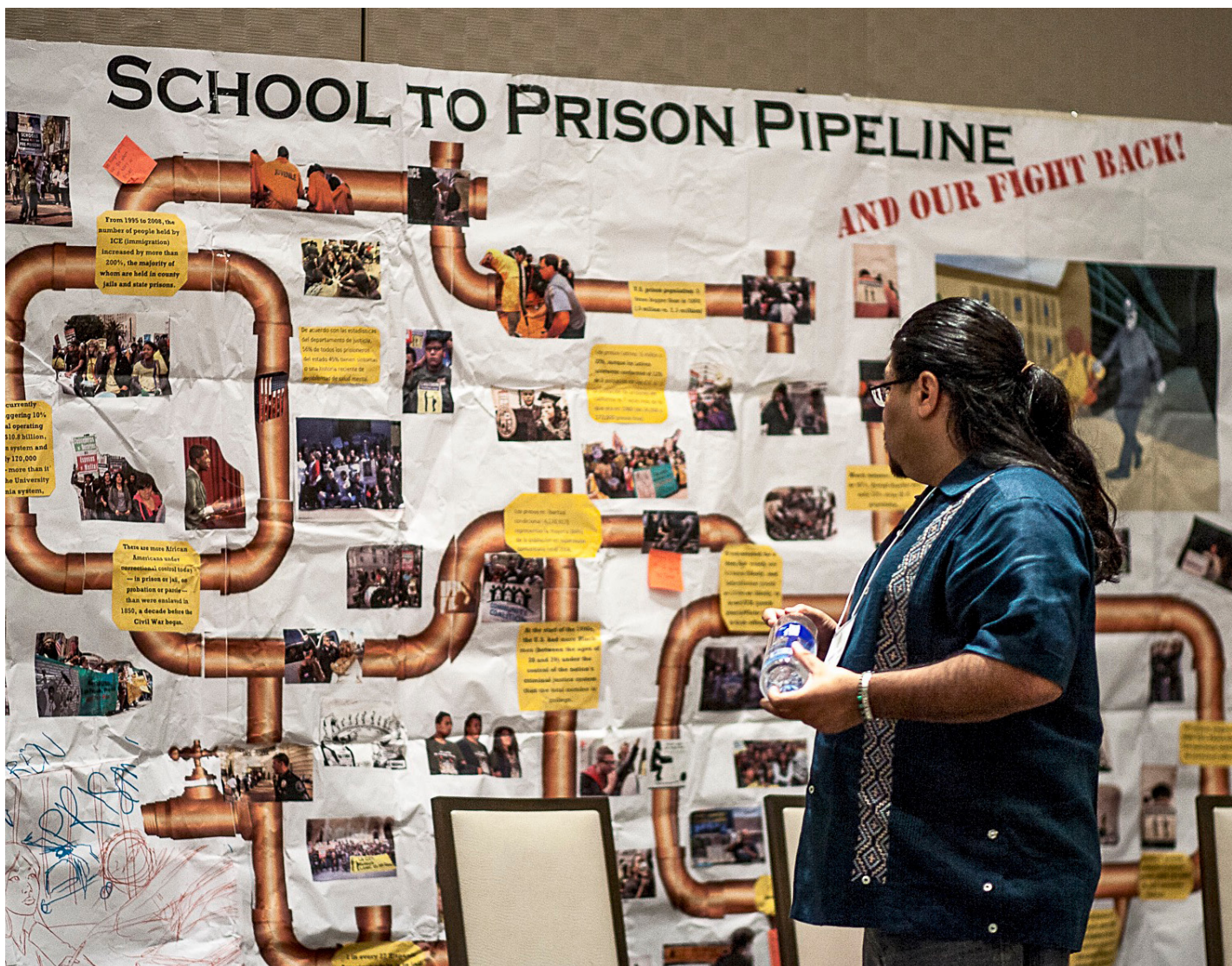


## ZONE 2: TAKING ACTION

Once an organizing group has built power it is positioned to move into the next zone of the map: taking action. Taking action involves leveraging the power an organizing group has accrued to press for change.

Action strategies, as indicated on the map, can take two forms. Organizing groups can hold decision-makers publicly accountable to the demands of the community, and they can cultivate alliances with people inside the political and/or educational system.

**CREATING PUBLIC ACCOUNTABILITY** often requires the mass mobilization of leadership and base, coupled with tactics that press for change from outside the system such as rallies, press conferences, or public meetings. Leadership and base often meet with decision-makers to persuade them to support their demands, while at many public events decision-makers are asked to indicate whether they support the goals of a campaign. In this way, decision-makers can be held publicly accountable for their promises.







**CULTIVATING INSIDER ALLIES** is the work of identifying those within the targeted system who can facilitate the realization of a group's goals. Insider allies can be at any system level — local, district, state, or federal. In some cases, organizing groups have worked to elect or have hired a person who is allied with their objectives. Nonetheless, these “insiders” must be held accountable to the group's leadership and base.

The tactics and targets of a campaign determine whether it is more strategic for a group to leverage its influence through public accountability or insider allies;

or, if both, whether simultaneously or sequentially. In the end, groups must exert enough pressure for an education win to result — expanding resources, reforming policy and practice, and/or democratizing governance.

The organizing story below provides an example of how one group took action to influence decision-makers. This youth organizing group, after attempting to persuade school district officials to work with them, used external pressure to get a district response to its concerns about school disciplinary policy and practices.

## TAKING ACTION: PUBLIC ACCOUNTABILITY

**VOICES OF YOUTH IN CHICAGO EDUCATION (VOYCE)** uses public actions, quantitative research, student stories, and strategic communications to hold Chicago Public Schools (CPS) accountable for disciplinary practices that disproportionately push students of color out of school. Initially, CPS officials were resistant to working with VOYCE to develop and adopt a revised discipline code that would have put stronger limits on the use of suspensions and arrests. After VOYCE released research showing racial disparities and high spending on ineffective school discipline, CPS created a working group that was, subsequently, disregarded by CPS leadership. Concerned by CPS' lack of action, VOYCE students took their research and personal stories public with a series of actions that put pressure on public officials. VOYCE's actions, research, and recommendations were covered extensively in the local press as well as the New York Times and Education Week, bringing attention to this issue. VOYCE's Campaign for Safe and Supportive Schools successfully applied pressure on public officials in 2012 to win a new Student Code of Conduct that ended automatic two-week suspensions, cut the maximum suspension time in half for all offenses, and ended arrests for disorderly conduct.



## ZONE 3:

# EDUCATION WINS

Once sufficient pressure is exerted through public actions and/or strong insider relationships, an organizing group is positioned to secure specific education changes. An education win is a clear and measurable change in structures, processes, procedures, access or allocations.

As indicated on the map, there are three major strategies for securing education wins: expanding resources, reforming policy and practice, and democratizing governance. In the past, education organizing groups worked mainly at the school or district level, but increasingly groups find they need to organize for wins at state and/or federal levels as well.

Groups that are **EXPANDING RESOURCES** are focusing on, first, whether financial, human, and material resources for public schools are adequate and distributed equitably; and second, whether officials feel accountable to parents, youth, and the community for their decisions about resources. (The vignette below shows how a CPER-supported adult organizing group organized to expand funding for credit

recovery programs that could ensure an increase in the numbers of youth ready for work and/or postsecondary education.)

### REFORMING POLICY AND PRACTICE

encompasses a set of strategies that organizing groups use to focus on a range of instructional and school climate issues. Through these strategies, organizing groups ensure that curriculum meets the multiple needs of youth for rigorous,



## EDUCATION WINS: RESOURCES

**COLEMAN ADVOCATES** in California has long worked for equity-based school reform to increase educational and career opportunities for all students in San Francisco. For decades, Coleman has mined district-level data to assess student needs and resource allocations in San Francisco Unified School District (SFUSD). Through this analysis, Coleman recognized that many students did not have enough credits to complete high school; accordingly, Coleman campaigned for the district to provide students with an array of accessible and effective credit recovery options, and to increase the district's credit recovery budget to meet demand. Coleman's ongoing analysis, monitoring, and advocacy — which included voicing their demands at a 2012 Board of Education budget hearing — resulted in the SFUSD Board's approval of \$850,000 in credit recovery opportunities for students in the class of 2014 and 2015 — up \$500,000 from SFUSD's originally proposed budget line. Coleman continues to push for increased resources to meet student need, advocating for a total \$2.7 million for credit recovery from the city.



culturally sensitive, and developmentally appropriate instruction. They also seek to develop classroom and school climates that reflect strong and respectful relationships. These strategies are designed to attract effective teachers to the system as well, and to ensure that they are equitably distributed across the school system, feel supported, and want to remain in their schools. Finally, these strategies promote the use of multiple assessments that are widely regarded as fair and credible. (The vignette below shows a CPER-supported

adult organizing group working to keep schools open in its neighborhoods, and leading other organizing groups from similar neighborhoods in other cities to do the same.)

**DEMOCRATIZING GOVERNANCE** is a strategy organizing groups use for ensuring that decision-making structures are inclusive and transparent. This may require new laws and/or new governing structures, or the diversification of membership in existing governance structures to include youth, parents, community members, and teachers. To ensure transparency, all information related to decision making must be public and accessible.

The targets that a campaign focuses on for an education win depend on the issue being addressed and the group's analysis of the power dynamics that affect it. For some campaigns, the school or district levels are the only necessary targets. In many cases, however, a group must attempt educational change at the state and/or federal levels in order for the school and district levels to be responsive.

## EDUCATION WINS: POLICY AND PRACTICE

**THE KENWOOD OAKLAND COMMUNITY ORGANIZATION (KOCO)** created the Mid South Education Association (MSEA) with the help of local school council members, parents, educators, and youth in order to ensure equitable educational opportunities for children in the Mid South area of Chicago. MSEA facilitated community involvement in schools by providing trainings for local school and parent advisory councils, addressing critical education issues such as school closings. MSEA galvanized a broad base of opposition to the "Mid South Plan" of Renaissance 2010, which had proposed closing 20 of 22 area schools; through its organizing work, MSEA saved nearly all of the proposed schools from closure.

MSEA's win did not halt the threat of school closings, however. In 2011, the Chicago Public Schools closed, phased out, or "turned around" more than 17 schools — including four from the Mid South — despite continued resistance from locally-based education organizing groups and coalitions. Through collaboration with national networks and CPER-supported groups across the country, KOCO organizers recognized that low-income communities of color in other cities faced similar policies. KOCO consequently co-convened the national Journey for Justice Campaign, a coalition of education organizing groups from 13 cities. Together, these groups have filed a federal civil rights complaint and called for a moratorium on school closings.

## ZONE 4:

# TRANSFORMATIONAL CHANGE

When education wins occur on multiple system levels, and in a number of different arenas, the stage is set for transformational change. Transformational change signifies a broad cultural shift where aspirations, beliefs, norms, and values have altered. Transformational change is the underlying goal of all organizing because its achievement is critical to long-term, sustainable change.

As the map indicates, transformation in the education arena includes four strategies: strengthening student learning, influencing norms and culture, gaining equity, and shifting the balance of power. The map also shows that individual and community transformation can occur in relationship to the process of educational change, or as a direct result of activities connected to building power and taking action. In other words, individual and community empowerment can occur even when a campaign has not yet resulted in education wins.

Education organizing, ultimately, is designed to transform the education system. Transformation occurs over time as education wins accrue. The strategy of **STRENGTHENING STUDENT LEARNING** means that student achievement improves and that students acquire the social, emotional, and civic skills they need to be prepared for postsecondary educational and career opportunities.

The strategy of **GAINING EQUITY** means organizing groups are working to have human, financial, and material resources distributed according to need, and to ensure all students have access to high quality schools. **SHIFTING THE BALANCE OF POWER** happens when parents, youth, and community members become full participants in decision making and new relationships of accountability exist among educators, officials, youth, parents, and community leaders.

### TRANSFORMATIONAL CHANGE: INFLUENCING NORMS AND CULTURE

**CALIFORNIANS FOR JUSTICE's (CFJ)** long-term commitment to ensure educational equity for California's students has influenced public will and discourse as well as policymaker priorities. CFJ and its partners in the statewide Campaign for Quality Education (CQE) alliance had advocated for adequate and equitable state education funding — and specifically a “weighted student funding” (WSF) formula — for six years by the time Edmund G. (Jerry) Brown ran for and won the governorship of California in 2011. At a time when few others were championing change in school finance as a strategy for reform, candidate Brown publicly supported WSF, influenced at least in part by CFJ's campaign. When, once in office, Brown's energies shifted toward supporting passage of Proposition 30 (California's ballot measure to increase taxes for public education), CFJ kept WSF on the front burner — while joining Brown and grassroots allies across the state (including many CPER-supported groups) in securing Proposition 30's historic passage in the November 2012 elections. Over the course of many years, the efforts of CFJ, the CQE, and others fertilized the ground for a gubernatorial candidate to advance school finance as a reform strategy; created public expectation that the state is responsible for equitable school funding through legislative means; and secured public will in favor of increasing tax dollars for public education to ensure all students an equitable opportunity to learn.



Finally, **INFLUENCING NORMS AND CULTURE** is a strategy that seeks change not only in structures and policies, but also in beliefs, values, and relationships. Norms and culture alter when reforms are aligned system-wide; when parents and education professionals develop shared aspirations for students; and when officials value, support, and collaborate with students, parents, teachers, and teacher organizations, including unions. Such changes can lead to schools becoming learning organizations in a continuous cycle of improvement. (The vignette on page 16 is an example of a CPER-supported adult organizing group that helped to create an environment in which education funding could become a viable political issue.)

The processes of organizing can also lead to individual and community empowerment. **INDIVIDUAL EMPOWERMENT** means that individuals have gained a heightened sense of agency — that is, the sense that they can act on socially and personally important issues and make change. In addition, their critical consciousness has developed as they are better able to relate their own story to a larger framework of social injustice.

**COMMUNITY EMPOWERMENT** means that an enhanced sense of social connection exists among community members and that they evidence the ability to act collectively. An empowered community is marked by civic capacity, which is exemplified by a robust civic infrastructure that functions across time and issues to mobilize cross-sectoral groups together around a shared agenda. (The vignette below shows a CPER-supported adult organizing group that over time built a collective community identity that enabled collective action.)

Ultimately, strategies for transformational change ensure system-wide alignment and implementation of reform policies and practices. The transformational process is ongoing, iterative, and cumulative through successive campaigns. At the end of each campaign, the organizing process begins again with changes that have occurred at institutional, individual, and community levels building a new — and elevated — foundation on which to begin the next campaign. This process continually moves the educational system, as well as individuals and communities, closer to the goal of transformational change that is significant and sustainable.

## TRANSFORMATIONAL CHANGE: COMMUNITY EMPOWERMENT

**THE LOGAN SQUARE NEIGHBORHOOD ASSOCIATION (LSNA)**, a member of both the Grow Your Own Teachers and VOYCE coalitions in Chicago, has a long record of achieving policy wins that yield increased resources with important results for individuals, schools, and communities. Designed to promote shared participation and collective community, LSNA's Parent Mentors program engages parents as members of a structured team of trained classroom assistants, fostering parent leadership in powerful ways. The mentors themselves, predominantly immigrant mothers, report a shift from isolation to active participation in public life, experiencing themselves as change agents — with dozens returning to school to become certified teachers themselves. More than 1,000 parent mentors have graduated from LSNA's Parent Mentors program in the past decade. LSNA found that when schools treat parents as partners, welcoming them at decision-making tables and into the classroom, parents grow as leaders and schools become more successful in engaging students, increasing student achievement, and becoming centers of community.

# INDICATOR CHARTS

## THEORY OF CHANGE & INDICATORS

The theory of change presented in the previous section uses the transit map metaphor to depict the paths that education organizing takes to bring about change. Here we show how each strategy in the theory of change offers a potential arena for assessment. We connect each strategy with a specific set of indicators to measure the change processes and outcomes. Before we introduce the set of indicator charts on page 21, we describe how they are organized and how to read them. We also offer answers to some key questions about how to use them.

The theory of change moves through four zones — building power, taking action,

education wins, and transformational change — each representing a component of the education organizing process. The first two zones include strategies which have what we call **PROCESS OUTCOMES**: measurable goals of various organizing activities. The strategies in the next two zones are **INTERIM AND LONGER-TERM OUTCOMES** on individuals, communities, and institutions.

For each zone we developed a chart identifying **INDICATORS** of progress toward the goals of each strategy. The charts group indicators by strategy. Table 1, below, offers an outline of the four zones of the theory of change and the strategies in each.

TABLE 1: STRATEGIES BY ZONE

BUILDING POWER	TAKING ACTION	EDUCATIONAL WINS	TRANSFORMATIONAL CHANGE
<ul style="list-style-type: none"><li>• Developing Leadership &amp; Base</li><li>• Increasing Organizational Capacity</li><li>• Participating in Coalitions &amp; Alliances</li><li>• Communicating Strategically</li></ul>	<ul style="list-style-type: none"><li>• Creating Public Accountability</li><li>• Cultivating Insider Allies</li></ul>	<ul style="list-style-type: none"><li>• Expanding Resources</li><li>• Reforming Policy &amp; Practice</li><li>• Democratizing Governance</li></ul>	<ul style="list-style-type: none"><li>• Individual Empowerment</li><li>• Community Empowerment</li><li>• Strengthening Student Learning</li><li>• Gaining Equity</li><li>• Shifting the Balance of Power</li><li>• Influencing Norms and Culture</li></ul>

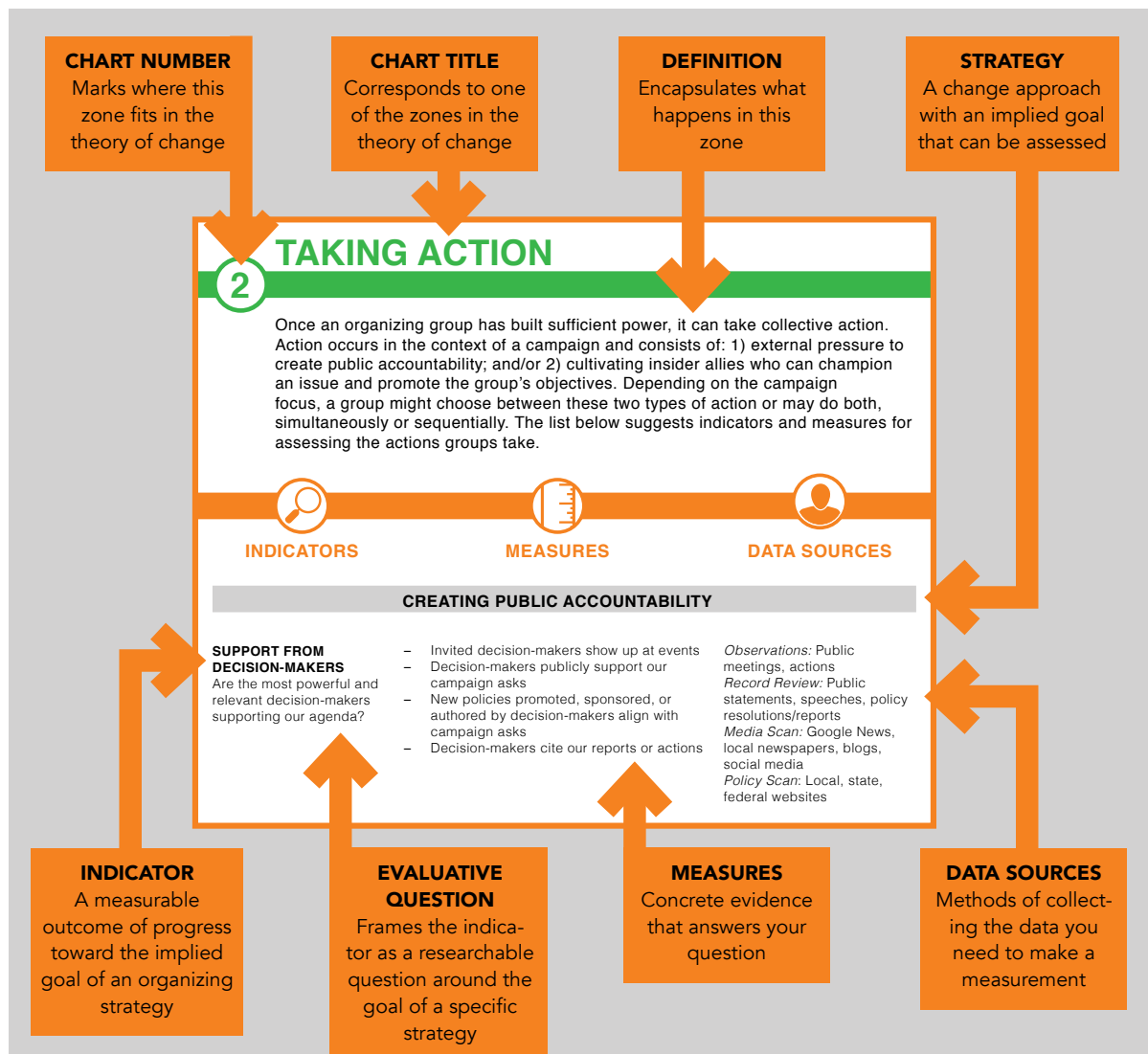
# READING THE INDICATOR CHARTS

To demonstrate how to use the indicator charts, we have annotated a sample chart below for you to refer to as you read this section. At the top of each chart you will see a number, title, and definition. The **TITLE** corresponds to one of the four zones in the theory of change; the **NUMBER** reminds you where this zone falls in the process-outcome cycle; and the **DEFINITION** encapsulates what happens in this zone.

Within each chart is a set of **STRATEGIES**. The figure below illustrates the strategy Creating Public Accountability. Under each strategy, in the left column, we identify a set of **INDICATORS**. Indicators can be qualitative or quantitative measures that

can help a group track its progress toward the goal implied by the strategy. In the Creating Public Accountability example, the indicator we show is Support from Decision-Makers.

For each of the indicators, we provide an **EVALUATIVE QUESTION**. Such evaluative questions cannot be answered with merely a yes or no answer — they need to be supported with evidence, such as the **MEASURES** that are in the middle column. The measures can be found by using the **DATA SOURCES** in the third column (see Appendix D: Glossary of Terms at the end of the Guide for definitions of evaluation terms, such as indicators, measures, data sources, etc.).





## Q & A About Using the Indicator Charts

**Q: Can the indicators, evaluative questions, measures, and data sources help an education organizing group with an external evaluation or self-assessment?**

**A: YES.** *The Indicators Framework provides a start for self-assessment or for working with external evaluators. Evaluations using this framework can address a broad range of both formative (process and implementation) and summative (impacts and outcomes) questions. The indicators, evaluative questions, measures, and data sources provide a place to begin an evaluation or self-assessment by creating a shared language for understanding the organizing process and a shared set of expected interim and long-term outcomes. However, organizing groups are unique, so groups and funders need to tailor an evaluation to match each group's particular interests and needs.*

**Q: Are the strategies, indicators, evaluative questions, measures, and data sources comprehensive?**

**A: NO.** *But they are a good place to start. A good set of indicators, evaluative questions, measures, and data sources are never intended to be static: the work of defining measures and marking results is constantly in process. Therefore, the indicator charts are not meant to be exhaustive, but suggestive. Youth and adult education organizing is dynamic, and constantly developing in relation to on-the-ground experience as well as in reaction to changes in the education landscape. The indicator charts reflect this particular moment in time, and are designed to be flexible with changing realities.*

**Q: Can the questions and measures be used as a checklist for what an education organizing group ought to be doing?**

**A: NO.** *But they should be relevant to your particular campaign. The federal, state, city, and district context in which an education organizing campaign is developing shapes its strategies, and to some extent its outcomes. These contextual factors — the status of educational policy; federal, state, and local politics; and changing demographics — influence the course of a campaign. Therefore, before applying the indicator charts, it is important to start with the specific strategies and goals of an education organizing campaign. With the map and indicator charts guiding them, funders, educators, and education organizing groups can discuss the change process, what zone the group is currently working in, the strategies it is focusing on, and what progress toward its goals might be reasonably expected. The indicator charts can help make sense of a campaign and its results, but cannot be used prescriptively to determine the course of a campaign.*

The need for understanding how to measure the impact of education organizing on policy, practice, and outcomes for students has never been greater. Equally important is the need to delineate how these efforts result in the development of youth and adult leadership and stronger communities.

Now that you are familiar with how to use the indicator charts, you will find them on pages 21–34 in their entirety. They, in combination with the theory of change, provide a means for tracking the accomplishments of education organizing in the complex context of the current reform era.

# BUILDING POWER

1

The core strength of organizing groups is their ability to amass an organized base and act strategically. Building power relies on: developing leadership and base; increasing organizational capacity; participating in coalitions and alliances; and communicating strategically. The list below suggests indicators and measures that can be used to assess a group's power.



## INDICATORS



## MEASURES



## DATA SOURCES

### DEVELOPING LEADERSHIP & BASE

#### NUMBERS

Do we have a sufficient and consistent number of leaders and a large enough base?

- Turnout at meetings, actions, public events, trainings
- Number and frequency of one-on-one meetings
- Consistent participation

*Observations:* Public events, actions  
*Record Review:* Sign-in sheets, contact database

#### KNOWLEDGE

Do leadership and base demonstrate knowledge of education and politics?

- Leadership and base can:
- Communicate knowledgeably about diverse educational and political issues
  - Interact effectively to influence decision-makers

*Observations:* Public events, trainings, actions  
*Interviews:* Staff, leaders, base  
*Media Scan:* Google News, local newspapers, blogs, social media

#### SKILLS

Do leadership and base demonstrate civic engagement and organizing skills?

- Leadership and base can:
- Identify and assess problems
  - Gather and evaluate data
  - Take part in power analysis
  - Take part in setting goals and picking strategies, tactics, and targets
  - Facilitate collective decisions
  - Act quickly and flexibly in response to challenging conditions
  - Locate and/or develop resources
  - Communicate effectively
  - Build support and legitimacy for action

*Observations:* Planning meetings, public events  
*Interviews:* Staff, leaders, base  
*Surveys\*\*:* Leaders, base

### INCREASING ORGANIZATIONAL CAPACITY

#### CLEAR MISSION

Do we have a clear mission, understood by all stakeholders?

- Staff, leaders, base, and external stakeholders have a common explanation of our mission
- Media accurately portrays our mission
- Leadership and base connect the mission to their own experiences and beliefs

*Interviews:* Staff, leaders, base, external stakeholders  
*Media Scan:* Google News, local newspapers, blogs, social media

## BUILDING POWER contd.



### INDICATORS

#### ACKNOWLEDGMENT

Do education and political decision-makers acknowledge us as powerful?

- Number and prominence of decision-makers who cite our organization when talking about education
- Number of official invitations to speak at public meetings
- External education stakeholders and the media can point to our successes

#### EXPERTISE

Does our staff have the necessary expertise?

- Staff can:
- Bring varied expertise in organizing, research, politics, education, and communications to the organization
  - Speak knowledgeably on diverse educational and political issues
  - Effectively support and/or train others in their areas of expertise

#### DATA USE

Does staff collect and use data in ways that support internal organizational assessment and improvement?

- Staff can:
- Speak knowledgeably about data sources and analysis
  - Contribute to improvement/growth plans based on data
  - Produce data-based issue reports

#### FINANCIAL STABILITY

What strategies are in place to ensure our financial stability and make us a sustainable group?

- Number and variety of funding streams
- Multiple-year funding streams are developed
- Staff includes designated grant writer/fundraiser
- Opportunities for learning about fundraising are made available

### DATA SOURCES

*Observations:* Public events, actions  
*Interviews:* Media, external stakeholders  
*Media Scan:* Google News, local newspapers, blogs, social media

*Observations:* Internal meetings, trainings  
*Interviews:* Staff, leaders  
*Record Review:* Internal documents

*Interviews:* Staff, leaders  
*Record Review:* Internal documents

*Observations:* Internal meetings, trainings  
*Interviews:* Staff, leaders, funders  
*Record Review:* Internal documents

## PARTICIPATING IN COALITIONS AND ALLIANCES

#### IDENTIFYING PARTNERS

Are we partnering with the right groups to advance our issues?

- Our partners:
- Represent a range of stakeholders
  - Increase our strength in numbers
  - Increase access to expertise, skills, legitimacy, and/or power

*Interviews:* Staff, leaders, partners  
*Surveys\*\*:* Staff, leaders, coalition members  
*Power Analysis:* Important players in education

#### PARTNERSHIP STRENGTH

How strong are the partnerships we are forming?

- Among partners, there is:
- Good communication
  - Alignment of vision and goals
  - Trust
  - Clear and shared decision-making
  - Adaptability/flexibility
  - Adherence to agreed-upon protocols

*Observations:* Coalition meetings  
*Interviews:* Staff, leaders, coalition members  
*Surveys\*\*:* Staff, leaders, coalition members  
*Record Review:* Meeting minutes

## BUILDING POWER contd.



### INDICATORS

#### COALITION BUILDING & MANAGEMENT CAPACITY

Do our staff and leaders have the skills and vision to build new relationships and manage the demands of working in coalitions and alliances?

Staff and leaders:

- Value being part of something bigger
- Make time for coalition work
- Exhibit collaborative skills such as the ability to communicate, manage relationships, assess strategy, and negotiate to reach agreement

*Observations:* Coalition meetings, organization meetings

*Interviews:* Staff, leaders, coalition members



### MEASURES



### DATA SOURCES

## COMMUNICATING STRATEGICALLY

#### COMMUNICATIONS TECHNIQUES

Can our leaders, base, and staff effectively use diverse communications techniques and media?

Leadership, base, and staff can:

- Use a variety of communications strategies: oral (e.g., speeches), visual (e.g., PowerPoint), print (e.g., op eds, commentaries) and social media (e.g., blogs)
- Increase participation in our organization as a result of communications outreach

*Observations:* Actions, public events, website monitoring

*Interviews:* Leaders, base, staff

*Record Review:* Self-produced media and communications

#### ISSUE/MESSAGE FRAMING

Can our leaders, base, and staff strategically frame issues for social and mainstream media?

Leadership, base, and staff can:

- Create frames/messages that resonate with leaders and base
- Write organizational pamphlets, brochures, media communications, and social media that reflect a consistent message
- Stay on message at public events and media briefings

*Interviews:* Leaders, base, staff, media

*Record Review:* Press releases and other self-produced media and communications.

*Surveys\*\*:* Staff

*Media scan:* Google News, local newspapers, blogs, social media

#### MEDIA COVERAGE

Are we receiving media coverage that raises our visibility and forwards our issues?

- Number of times our partnerships or events are featured in the media
- Number of “hits” on social media coverage
- Recognition and interest in our work after media coverage by potential allies, other journalists, public officials, etc.
- Media adopts our framing of issues

*Interviews:* Public officials, partners, media, staff

*Media Scan:* Google News, local newspapers, blogs, social media

#### COMMUNITY VOICE

Do officials recognize us as a community voice on educational issues?

Media and officials:

- Convey the importance of the priorities and values of our group
- Turn to our group when they are looking for a community/parent/youth perspective

*Interviews:* Media, officials

*Media Scan:* Google News, local newspapers, blogs, social media

\*\*See “Appendix C: Recommended Surveys” for survey examples



## 2

# TAKING ACTION

Once an organizing group has built sufficient power, it can take collective action. Action occurs in the context of a campaign and consists of: 1) external pressure to create public accountability; and/or 2) cultivating insider allies who can champion an issue and promote the group's objectives. Depending on the campaign focus, a group might choose between these two types of action or may do both, simultaneously or sequentially. The list below suggests indicators and measures for assessing the actions groups take.



## INDICATORS



## MEASURES



## DATA SOURCES

### CREATING PUBLIC ACCOUNTABILITY

#### SUPPORT FROM DECISION-MAKERS

Are the most powerful and relevant decision-makers supporting our agenda?

- Invited decision-makers show up at events
- Decision-makers publicly support our campaign asks
- New policies promoted, sponsored, or authored by decision-makers align with campaign asks
- Decision-makers cite our reports or actions

*Observations:* Public meetings, actions  
*Record Review:* Public statements, speeches, policy resolutions/reports  
*Media Scan:* Google News, local newspapers, blogs, social media  
*Policy Scan:* Local, state, federal websites  
*Power Analysis:* Decision makers in education

#### MEDIA COVERAGE

Have our efforts led to media coverage that shows us as an influential group?

- Number of times our events show up in media
- Media adopts our organization's language or framing
- Media references our organization and/or reports when addressing our issues

*Interviews:* Media  
*Media Scan:* Google News, local newspapers, blogs, social media

#### TRANSPARENCY

Have our efforts made relevant data public?

- Data on educational issues relevant to our campaign are accessible to our leadership and base

*Interviews:* Staff, leaders, base  
*Record Review:* Available data, reports  
*Media scan:* Google News, local newspapers, blogs, social media

## TAKING ACTION contd.



### INDICATORS



### MEASURES



### DATA SOURCES

#### CULTIVATING INSIDER ALLIES

##### **STRONG RELATIONSHIPS**

Have we developed strong relationships with those in positions to influence decisions relevant to our campaign?

- We have access to political/district officials
- Political/district allies share our beliefs and principles
- We collaborate with political/district officials

*Observations:* Interactions between staff, leaders, and/or base with allies, political/district officials

*Interviews:* Staff, leaders, base, allies, political/district officials

*Record Review:* Meeting agendas, minutes

*Power Analysis:* Influential political/district officials

##### **OBJECTIVES ARE BEING PROMOTED**

Has our work with insider allies promoted our agenda?

- Allies are knowledgeable enough to discuss our issues and objectives with other officials
- Allies have pushed our concerns
- Media interviews with, or op eds by, our allies demonstrate their commitment to our agenda
- Allies have included us at decision-making tables

*Observations:* Hearings, committee meetings, other public events or decision making events

*Interviews:* Allies

*Media Scan:* Google News, local newspapers, blogs, social media

# EDUCATION WINS

3

Education organizing campaigns lead to clear and measurable wins. Depending on the campaign, these wins affect educational governance, policy and practice, and/or resources. They involve changes in structures, processes, procedures, access, and allocations. Increasingly, as the education landscape has shifted and state and federal government have taken a stronger role in education, organizing groups have had to focus their efforts at multiple system levels: federal and state in addition to district and local school levels. The list below suggests indicators and measures for assessing a group's education wins.



## INDICATORS



## MEASURES



## DATA SOURCES

### RESOURCES

#### FUNDING LEVELS

Are new funds becoming available to support public education?

- New revenue streams are directed toward public education
- State funding formulas are readjusted prioritizing public education
- Funding is made available to support program reforms

*Interviews:* Public officials, financial managers, education professionals  
*Record Review:* Budget statements, state funding formulas  
*Policy Scan:* Local, state, federal websites

#### DISTRIBUTION

Are financial, human, and material resources more equitably distributed?

- State funding formulas promote equity and adequacy
- Principals and teachers are distributed within schools and across a district to promote equity
- High quality school materials (textbooks, technological equipment, etc.) are distributed equitably
- Counselors, nurses, special education teachers, ELL teachers, aides, substitutes, etc. are distributed equitably

*Observations:* Schools, school resources (e.g., computer lab, textbooks)  
*Interviews:* Public officials, financial managers, youth, parents, education professionals  
*Record Review:* District and state human resources data, budget statements, state funding formulas  
*Policy Scan:* Local, state, federal websites

#### ACCOUNTABILITY

Are officials accountable for the effective use of resources?

- Resource data is publicly accessible
- Decisions about distribution of resources involve youth, parents, and community members

*Observations:* School board meetings, budget and committee hearings  
*Interviews:* Public officials, youth, parents  
*Record Review:* Meeting minutes, public data  
*Policy Scan:* Local, state, federal websites

# EDUCATION WINS contd.



## INDICATORS



## MEASURES



## DATA SOURCES

### POLICY AND PRACTICE

#### CURRICULUM & INSTRUCTION

Is curriculum and instruction culturally responsive and rigorous, as well as appropriate for the developmental, socio-emotional, and expressive needs of youth?

- K-12 curriculum reflects the goal of all students being college or career ready
- Curriculum and instruction promote critical thinking and technological competence
- Curriculum and instruction are culturally relevant and responsive
- Curriculum and instruction provide youth with the opportunity to develop the knowledge, skills, and dispositions to contribute to civic life and make a difference in their communities
- Curriculum and instruction support youth expressing themselves through the arts

*Observations:* Teaching, student engagement  
*Interviews:* Youth, parents, education professionals  
*Record Review:* School curriculum, district website, postsecondary data

#### CLIMATE

Do classroom and school climates reflect cultural sensitivity and support community building?

- Alternative disciplinary practices are implemented (e.g., restorative practices, youth courts) that encourage interpersonal conflict negotiation
- Behavioral expectations are understood by students and adults
- Schools value family and community participation (e.g., multi-lingual signage and translation services are available)

*Observations:* Disciplinary practices in schools  
*Interviews:* Youth, parents, education professionals  
*Record Review:* Student handbook, district website

#### ACCESS TO OPPORTUNITY

Do policies promote equity in access to high quality and appropriate school programs for all youth?

- Social, emotional, and academic supports are available
- Opportunities for more and better learning time are available
- School selection/enrollment processes are transparent and fair
- Policies/laws mandate support and funding for special needs and ELL youth and families

*Observations:* Supports in schools  
*Interviews:* Youth, parents, education professionals (e.g., support staff)  
*Record Review:* Student handbook, state policies and laws, school district websites

#### EFFECTIVE TEACHERS

Do policies and practices attract, develop, support, and retain effective teachers?

- Effective teachers are retained in schools serving low-income populations
- There are adequate numbers of certified special education and ESL teachers, and in content areas
- Teaching forces are diverse, reflecting local communities
- Mentoring is provided to new teachers
- Teachers have opportunities for ongoing professional development related to rigorous and responsive pedagogy, new behavioral approaches, the local

*Observations:* Teacher professional development, teacher planning periods, parent-teacher meetings, back-to-school nights  
*Interviews:* Youth, parents, education professionals, (e.g., teachers, principals)  
*Record Review:* School district and state websites, district and state human resources data, union contracts.



# EDUCATION WINS contd.



## INDICATORS



## MEASURES



## DATA SOURCES

### ASSESSMENT

Are assessments of schools, districts, and youth credible and valid?

- community, ways to nurture youths' socio-emotional development, and how to use multiple assessment measures
- Teacher organizations, including unions, are working collaboratively with parents, youth, and community members to support teachers and enable them to carry out their work
- Various voices are included in assessment (e.g., youth, parents, community)
- Assessments include diverse measures (e.g., tests, observations, performance, portfolio, etc.)
- Assessments use rubrics which include multiple outcomes (e.g., critical thinking skills, content knowledge, citizenship)

*Interviews:* Elected officials, education professionals  
*Record Review:* Standards, teacher evaluations  
*Policy Scan:* Local, state, federal websites

## GOVERNANCE

### INCLUSIVE STRUCTURES

Are decision-making structures inclusive?

- Structures and processes are in place for sustaining youth, parent, teacher and community participation in decision making
- Legislation enforces youth, parent, teacher and community voice in decision making as part of the democratic structure of the school and district

*Observations:* Decision-making meetings  
*Interviews:* Elected officials, youth, parents, community members, education professionals  
*Media scan:* Google News, local newspapers, blogs, social media  
*Policy scan:* Local, state, federal websites

### TRANSPARENT STRUCTURES

Are decision-making structures transparent?

- Information on decision making (e.g., agenda, minutes) is public and accessible (e.g., translated, available in multiple forms)
- Legislation enforces transparency in school and/or district decision making

*Interviews:* Elected officials, youth, parents, community members, education professionals  
*Record Review:* Meeting minutes, agenda  
*Media Scan:* Google News, local newspapers, blogs, social media  
*Policy Scan:* Local, state, federal websites

# TRANSFORMATIONAL CHANGE

Transformational change reflects a broad cultural shift in which aspirations, beliefs, norms and values are altered. Education organizing leads to transformation of educational institutions, as well as of individuals and communities. Transformation of educational institutions can include student learning that strengthens youths' ability for a productive life; equity of resources and opportunity; a balance of power in which the input of all stakeholders has value and there is mutual accountability; and/or new and sustainable norms around governance, teaching, and learning. For individuals and communities, transformation means empowerment — that is, a heightened sense of individual and collective agency and the creation of long-term civic infrastructure. The list below suggests indicators and measures for assessing a group's progress toward making transformational change.



## INDICATORS



## MEASURES



## DATA SOURCES

### INDIVIDUAL EMPOWERMENT

#### SELF-EFFICACY

Have individuals developed a sense of heightened agency?

Individuals:

- Express feelings of self-confidence
- Demonstrate ability to be self-directed
- Believe in their ability to use civic skills to affect change in matters of personal and civic importance

*Interviews:* Leaders, base, staff

*Surveys\*\*:* Leaders, base

#### CRITICAL CONSCIOUSNESS

Have individuals developed a critical consciousness of social injustice?

Individuals:

- Connect their stories to larger social issues
- Demonstrate an understanding of how power functions
- Take responsibility for promoting a social justice agenda
- Demonstrate knowledge of political systems and dynamics
- Demonstrate ability to think critically about civic and political life

*Observations:* Public events, actions, planning meetings

*Interviews:* Leaders, base, staff

*Surveys\*\*:* Leaders, base

#### PUBLIC ACTORS

Have individuals involved become participants in the public domain?

Individuals:

- Demonstrate skill and comfort in public speaking and other civic skills, such as, forming agendas and reaching consensus
- Participate actively in civic organizations oriented to social justice agendas
- Demonstrate political participation

*Observations:* Public events, actions, planning meetings

*Interviews:* Leaders, base

*Surveys\*\*:* Leaders, base

# TRANSFORMATIONAL CHANGE contd.



## INDICATORS



## MEASURES



## DATA SOURCES

### COMMUNITY EMPOWERMENT

#### **SOCIAL CAPITAL**

Has social capital developed among community members where we organize?

Community members:

- Express a sense of collective belonging
- Have a dense web of relationships within and across communities
- Have trust across ethnic, racial, and religious groups
- Have a sense of mutual obligation across groups
- Participate in both formal and informal networks for community problem solving
- Express positive views of their communities and schools

*Observations:* Internal meetings, public events, actions

*Interviews:* Leaders, base, staff, community members

*Surveys\*\*:* Leaders, base, community members

#### **COLLECTIVE ACTION**

Has the ability to take collective action developed among community members in areas where we organize?

Community members:

- Express a sense of collective agency, particularly as it relates to educational transformation
- Identify areas of shared interest
- Mobilize human and financial resources

*Observations:* Community meetings, public events, actions

*Interviews:* Leaders, base, community members

*Surveys\*\*:* Leaders, base, community members

*Record Review:* Sign-in sheets, contact database

*Media Scan:* Google News, local newspapers, blogs, social media

#### **CIVIC CAPACITY**

Has civic capacity developed in areas where we organize?

- Groups across sectors — business, education, government, civil society — and across race, ethnic, religious and class fault lines come to agreement on problems and solutions
- Groups are able to set a course and mobilize resources for action
- Groups institute civic infrastructure to sustain participation

*Observations:* Community meetings, public events, actions

*Interviews:* External stakeholders

*Record Review:* Meeting notes

*Media Scan:* Google News, local newspapers, blogs, social media



# TRANSFORMATIONAL CHANGE contd.



## INDICATORS



## MEASURES



## DATA SOURCES

### STUDENT LEARNING

#### K-12 LEARNING

Are all students demonstrating high levels of achievement and acquiring the content and social, emotional, and civic skills necessary for productive engagement in a diverse society?

Students:

- Exhibit ability to comprehend, apply, analyze, synthesize, and evaluate information through multiple measures
- Demonstrate engagement in the classroom
- Have multiple opportunities to learn and apply new knowledge and skills
- Have linked learning opportunities, that is, the chance to connect academic and/or career and technical education to real world experience in a range of fields

*Observations:* Schools

*Interviews:* Education

professionals, youth, parents

*Record Review:* Portfolios, student work, school data, test scores, district and state websites

*Databases:* National Student Clearinghouse, National Center for Education Statistics (NCES)

#### POSTSECONDARY LEARNING

Are students better prepared for postsecondary educational and/or career opportunities?

- High graduation rates
- High percentage of students attending postsecondary institutions and/or in a job with a career track
- Availability of postsecondary education and career pathways, that is, internships, technology instruction, work-based learning, counseling, and supports that provide a link to future opportunities

*Interviews:* Education

professionals, youth, parents

*Record Review:* School data, test scores, district and state websites

*Databases:* National Student Clearinghouse, National Center for Education Statistics (NCES), Integrated Postsecondary Education Data System (IPEDS)

### EQUITY

#### RESOURCES

Is there an equitable distribution of financial, human, and material resources?

- Political and legal infrastructure exist for enforcing funding equity/adequacy
- Disparities among districts based on property wealth have decreased
- High-need districts receive adequate funds
- Highly-effective principals and teachers are serving high-poverty populations
- All schools have a diverse teaching force
- Schools are resourced with instructional materials, technology, capital infrastructure, and needed programs and supports

*Interviews:* Public officials, leaders, base, community members

*Record Review:* School and district budgets and records, budget meeting minutes

*Media Scan:* Google News, local newspapers, blogs, social media

*Policy Scan:* Legal documents

#### FAIR ACCESS

Do all students have access to high quality schools?

- All students have access to strong public school options
- Parents, youth, and community members express confidence that the school choice/assignment process is transparent, fair, and meets their needs

*Interviews:* Education

professionals, public officials, leaders, parents, youth

*Record review:* Established school policies

# TRANSFORMATIONAL CHANGE contd.



## INDICATORS



## MEASURES



## DATA SOURCES

### BALANCE OF POWER

#### BELIEF IN SHARED DECISION MAKING

Do decision-makers value parent, youth, community and teacher participation in educational decision making?

- Decision makers and education professionals express commitment to include youth, parents, and community members in decision-making meetings
- Community input is expected when making educational decisions
- Community participation is structured into plans and policies for reform
- Media discourse reflects value of parent, youth, community, and teacher participation in decision-making

*Observations:* Community meetings, public forums, hearings, meetings with public officials  
*Interviews:* Leaders, education professionals, public officials  
*Record Review:* Meeting minutes, correspondence between officials and leaders/ community members  
*Media Scan:* Google News, local newspapers, blogs, social media  
*Policy Scan:* Local, state, and federal websites

#### NEW ACCOUNTABILITY

Have new relationships of accountability emerged among education professionals, officials, youth, parents, and community leaders?

- Public officials generate more reliable, publicly available information about the progress of education reform
- Public officials are open about decision making and the basis of assessing school, teacher, and student performance
- Teachers demonstrate responsibility for cultural responsiveness
- Parents engage with teachers to support children's learning
- Media discourse reflects new relationships of accountability

*Interviews:* Leaders, education professionals, public officials  
*Media Scan:* Google News, local newspapers, blogs, social media  
*Policy Scan:* Local, state, and federal websites

#### INSTITUTIONALIZED PARTICIPATION

Have policies at the school, district, state, or federal level institutionalized significant youth, parent, and community participation?

- Public and elected officials value participatory structures and policies
- Community voices are represented in education decision making
- Community members have ongoing access to policy makers and elected officials
- Education professionals and officials consult community organizations about education issues
- Resources and mechanisms are in place to ensure youth and community access to knowledge on key educational topics, issues, policies and decisions

*Observations:* Community meetings, meetings with public officials  
*Interviews:* Leaders, education professionals, public officials, community members  
*Record Review:* Correspondence among officials and leaders/ community members  
*Media Scan:* Google News, local newspapers, blogs, social media  
*Policy Scan:* Local, state, and federal websites

# TRANSFORMATIONAL CHANGE contd.



## INDICATORS



## MEASURES



## DATA SOURCES

### NORMS & CULTURE

#### STUDENT SUPPORTS

Are student supports (including ELL and special education) meeting the needs of all students and families?

- Public officials demonstrate commitment to funding and staffing student supports
- Achievement and graduation rates for ELL and special needs youth reflect high expectations
- Students and parents express satisfaction with student support systems

*Interviews:* Teachers, school administrators, public officials, leaders, parents, youth  
*Media Scan:* Google News, local newspapers, blogs, social media

#### STUDENT-CENTERED

Are schools student-centered learning environments that embrace academic, socio-emotional, expressive, and civic learning?

- Teachers demonstrate high expectations for all students' academic achievement
- Students believe teachers support them
- Teachers feel confident incorporating culturally-sensitive curriculum in their instruction
- Schools offer students varied opportunities for learning (e.g., experiential, inquiry-based, work-based, technical, artistic, etc.)
- Students feel safe and supported by peers in their schools
- Communication between school professionals and youth, parents, and community members is respectful and focused on student assets

*Observations:* Schools, classrooms, parent-teacher meetings  
*Interviews:* Education professionals, leaders, parents, youth  
*Record Review:* Established school policies

#### TEACHER-POSITIVE ENVIRONMENTS

Is there a culture of valuing teachers as professionals engaged in educating children and youth?

- Public officials and other school stakeholders demonstrate respect for the teaching profession as shown by salary, working conditions, participation in decision making, etc.
- Media discourse reflects a positive valuing of the teaching profession
- School environments affirm the value of a diversified teaching force
- Teachers demonstrate feelings of working in an environment of respect through commitment to and longevity in their school community
- Teachers' organizations, including unions, negotiate in a collaborative and respectful environment, in recognition of the interlocking relationship between the well-being of teachers and the well-being of their students

*Observations:* Schools, classrooms, teacher professional development, teacher union meetings  
*Interviews:* Teachers, school administrators, public officials, contract negotiators  
*Media Scan:* Google News, local newspapers, blogs, social media  
*Record Review:* School human resources records, district and state websites



# TRANSFORMATIONAL CHANGE contd.



## INDICATORS



## MEASURES



## DATA SOURCES

### SUSTAINABILITY

Are reforms of policies and practices in classrooms, schools, and/or districts sustainable?

- Policies and practices reflect community values and demonstrate longevity and stability
- Collaboration around development, assessment, and improvement of schools and education programs is ongoing and inclusive
- School professionals buy into, and garner support for, new policies and practices
- Schools experience stability of teachers and leadership
- School systems experience sustained leadership

*Observations:* Schools, classrooms  
*Interviews:* Education professionals, leaders, parents, youth

### LEARNING ORGANIZATIONS

Are schools organizations in which parents, youth, and educators participate in a continuous cycle of learning, reflection, and improvement?

- Schools are places for adult learning, including training around new instructional and curricular approaches and cultural responsiveness
- School leaders create opportunities for educators, youth, and community members to discuss and design responses to student outcome data, curriculum, and instruction
- Veteran and new teachers share essential knowledge for program sustainability
- Observation and feedback on classroom practice routinely takes place among teachers, administrators, students, and parents

*Observations:* Professional development, school events  
*Interviews:* Education professionals, leaders, parents, youth  
*Record Review:* School meeting minutes, agendas

### ISSUE FRAMING

Are education issues and solutions consistent with our group's values?

- The media presents education issues and solutions that reflect community viewpoints
- The discourses of education leaders, public officials, and the media reflect a robust and powerful multidimensional vision of schooling; a commitment to equity; valuing of an empowered, trained, well-resourced professional teaching force; and principles that embrace the participation of youth, parents, and community in decision-making

*Observations:* Public hearings and events, etc.  
*Media Scan:* Google News, local newspapers, blogs, social media

\*\*See "Appendix C: Recommended Surveys" for survey examples

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## APPENDIX B

# CPER-SUPPORTED GROUPS INTERVIEWED BY RFA

### Action United

846 North Broad Street, 2nd Floor  
Philadelphia, PA 19130  
215-839-3390

<http://actionunited.org/>

### Californians for Justice (CFJ)

520 3rd Street #209  
Oakland, CA 94607  
510-452-2728

<http://www.caljustice.org/>

**Coleman Advocates**

459 Vienna Street  
San Francisco, CA 94112  
415-239-0161  
<http://colemanadvocates.org/>

**Kenwood Oakland Community Organization (KOCO)**

1005 East 43rd Street  
Chicago, Illinois 60653  
773-548-7500  
<http://www.kocoonline.org/>

**Voices of Youth in Chicago Education (VOYCE)**

3334 W. Lawrence Ave, Third Floor  
Chicago, IL 60625  
773-583-1387  
<http://www.voyceproject.org/>

**Youth United for Change (YUC)**

1910 N. Front Street  
Philadelphia PA 19122  
215-423-9588  
<http://youthunitedforchange.org/>

**APPENDIX C****RECOMMENDED SURVEYS****Leadership and Base Development**

- City Year created a Civic Leadership Development Survey for its Corps Members focusing on six competencies: civic knowledge, team leadership, community assessment, project planning and management, public speaking, and working with children and youth. You can find the survey at [http://www.nationalserviceresources.org/files/sample-forms/AmeriCorps\\_Member\\_Civic\\_Leadership\\_Development\\_Survey.pdf](http://www.nationalserviceresources.org/files/sample-forms/AmeriCorps_Member_Civic_Leadership_Development_Survey.pdf)

**Organizational Capacity**

- The Core Capacity Assessment Tool (CCAT) is a 146-question online tool, created by TCC Group, that measures an organization's effectiveness through an analysis of its four core capacities — adaptive, leadership, management, and technical — and organizational culture. You can find the survey at: <http://www.tcccat.com/>
- Chicago Community Organizing Capacity Building Initiative was published in 2007, and provides guidelines for organizations to assess their community organizing capacity. You can find the tool at [http://www.woods-fund.org/site/epage/61443\\_735.htm](http://www.woods-fund.org/site/epage/61443_735.htm)
- Capacity Benchmarking Tool For Faith- and Community-Based Organizations is a

tool from the U.S. Department of Health and Community Services that measures fundraising, technology, staff, etc. [http://onestarfoundation.org/wp-content/themes/OneStar/documents/Capacity\\_Benchmarking\\_Tool.pdf](http://onestarfoundation.org/wp-content/themes/OneStar/documents/Capacity_Benchmarking_Tool.pdf)

**Coalitions and Alliances**

- The Partnership Assessment Tool was created in 2003 by the UK-based Strategic Partnership Taskforce in the Office of the Deputy Prime Minister in coordination with Nuffield Institute at the University of Leeds. <http://webarchive.nationalarchives.gov.uk/20120919132719/www.communities.gov.uk/documents/localgovernment/pdf/135112.pdf>
- The Levels of Collaboration Scale (Frey, B.B., Lohmeier, J.H., Lee, S.W., & Tollefson, N. (2006). Measuring collaboration among grant partners. *American Journal of Evaluation*, 27(3), 383–392.) can be found at [http://www.keccs.org/~eccs/pdf/Levels\\_of\\_Collaboration\\_Scale.doc](http://www.keccs.org/~eccs/pdf/Levels_of_Collaboration_Scale.doc)
- TCC Group's Jared Raynor's PowerPoint on Evaluating Coalitions and Networks can be found at <http://www.evaluationinnovation.org/sites/default/files/Jared%20Raynor%20PPT.pdf>



### Communications

- Smart Chart is an interactive, online tool that helps non-profits evaluate a communications effort already in progress. You can find the Smart Chart at <http://www.smartchart.org/>

### Individual Empowerment

- The Learning Center provides a leadership survey that they developed to identify important personal strengths, as well as areas where improvement is needed. You can find the survey at <http://www.learning-center.net/library/leadership.shtml>

### Community Empowerment

- In 2006, the Kennedy School of Government at Harvard University conducted a social capital community survey. The survey can be found at <http://www.hks.harvard.edu/saguaro/pdfs/2006SCCSw2.pdf>

- In March 2008, Ipsos MORI was commissioned by the London Borough of Camden, Specifically, the Engagement and Diversity Team within the Customers, Strategy and Performance Department to run a survey amongst Camden residents to establish levels of social capital in the borough. The full report with survey questions can be found at <http://www.camdendata.info/AddDocuments1/Camden%20Social%20Capital%20Survey%202008%20Final%20Report.pdf>. Survey questions start on page 130.

### System Norms

- This is a collective efficacy scale for teachers. It can be administered to teachers, school leadership, or community members: <http://www.waynekhoy.com/pdfs/collective-efficacy-long.pdf>

## APPENDIX D

# GLOSSARY OF TERMS

**Alliances:** Persons and/or groups that support each other's agendas and join together, in an informal or formal structure, to increase the strength of each to promote their goals.

**Assessments:** A systematic procedure for obtaining information from observation, interviews, portfolios, projects, tests, and other sources that can be used to make judgments about the implementation and outcomes of education programs and student learning.

**Balance of Power:** The distribution of roles at decision-making tables, particularly whether these tables include education organizing groups' leadership and base, ensuring that community voice has weight in shaping educational opportunities.

**Campaign:** An organized course of action strategically designed to promote an organizing group's goals.

**Civic Capacity:** The infrastructure to support the formation of broad governmental, civic and community agreement on the problems of and solutions for improving education, and the mobilization of the human, financial, and material resources needed to achieve and sustain the agreed upon agenda.

**Coalition:** Group with a common interest or purpose that comes together formally (i.e., identifies itself under a single banner), sets up rules for working together, and develops a platform to achieve collective goals.

**Community:** Residents of an area or individuals and groups with common interests.

**Community Empowerment:** The presence of a heightened sense of social connection and collective agency, and the long-term civic infrastructure to facilitate collective action.

**Data:** Evidence in different forms — statistics,

observations, survey responses, narrative and print accounts — that can answer an evaluative or research question or determine progress for a particular indicator.

**Data Sources:** Places to look for data and methods for collecting it for a given evaluative question and indicators.

**Equity:** Equity, unlike equality, concerns addressing the needs of those who have been historically disadvantaged and marginalized by the educational system, for whom securing greater (not “equal”) resources may be required. Equity entails all groups having the power, access and resources needed to be successful in learning and in postsecondary pursuits.

**Evaluative Question:** A question that guides inquiry in an evaluation or self-assessment and points to what should be measured and what data to collect.

**Governance:** Structures and methods for decision-making and oversight of schools and districts. Variations in governance are defined by: who is included and what decisions are in the purview of the group, how decision-makers are selected, and how public the process for decision-making is.

**Indicator:** A set of quantitative or qualitative measures that provide evidence to assess standing or progress with respect to values and goals. Indicators can be used to evaluate specific programs and determine their impact or they can serve as a means to track change or progress within an area of interest, such as community empowerment or equitable access to strong public education.

**Individual Empowerment:** A heightened sense of agency, which can lead to an individual being able to act on issues of personal or social importance. When individuals feel empowered they reflect the belief that becoming a public actor can alter unequal and unfair power arrangements.

**Insider Allies:** Institutional and elected officials in positions of influence with whom organizing groups develop relationships to move agendas forward.

**Leadership and Base:** Voluntary members of community organizing groups. Leadership and base are members of a community organizing group either because they are associated with a member institution, such as a church or school, or through their individual identification with the organization’s issues.

**Measures:** Specific methods for showing evidence to assess an initiative or program.

**Message Framing:** The development of messages that will frame or shape how others perceive an issue or problem. Frames can simplify complex issues, assign meaning to relevant conditions and events, emphasize particular interpretations, and render other interpretations less valid.

**Norms and Culture:** Assumptions, values, meanings, and patterns of behavior. In order for education wins to become institutionalized and sustained, norms and culture must also change.

**Partners:** Groups that come together either formally or informally for a specific purpose or goal.

**Power:** An organizing group’s ability to bring about change. Power results from factors such as an organization’s leadership and base, capacity, participation in coalitions and alliances, and ability to communicate strategically.

**Public Accountability:** The means through which community organizing groups create the political will for equitable, excellent, and culturally responsive schools. Public accountability is achieved when organized community members get support from decision makers. This support is confirmed in public venues where media coverage and the resulting transparency of commitments ensure that political officials and institution leaders keep their promises.

**School Climate:** A multi-dimensional term that refers to a school’s interactional environment, including relationships among teachers, students and other adults in the school community. This construct includes physical, social, and academic dimensions.

**School-to-Prison Pipeline:** A process associ-

ated with disciplinary policies and practices, such as zero tolerance, that push youth out of classrooms and into the juvenile and criminal justice systems.

**Social Capital:** The networks of mutual obligation and trust, both interpersonal and inter-group, that can be activated to leverage power and resources to address community concerns. A goal of education organizing is to build social capital both within low-income communities and bridging across different communities, connecting members of low-income communities with those in power.

**Strategy:** The approach a group pursues for making change. Every strategy has an

implied goal, and progress toward that goal can be measured.

**Theory of Change:** An explicit statement of the assumptions with which an effort or program intervention expects to achieve its goals. The theory maps out what actors have to do to achieve and sustain an organization's vision of success, and identifies the major linkages in the pathway that leads to intended outcomes.

**Transparency:** Openness in communication and accountability.

**Wins:** A campaign's desired tangible outcomes such as policies, new resources, or greater inclusiveness in decision-making.

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